Metrics Planning and Reporting Study Overview

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SEEDS Community Workshop
February 5 - 7, 2002

Purpose of Study

- Define appropriate solicitation opportunities and funding mechanisms for participants
- Define appropriate metrics collection and monitoring mechanisms for reporting (publicizing) performance (accomplishments)
- Recommend, to Earth Science Enterprise, appropriate language for inclusion in various types of solicitations

Approach

- Survey sponsoring and implementing organizations
  - Identify/Define "classes" of participants (data service provider classes similar to types of ESIPs; Program and Project offices) and define reporting requirements
  - Survey existing mechanisms for metrics planning and reporting, and their pros and cons
  - Contact projects (e.g., HST, ESSP), ESIP federation members and other entities to learn about mechanisms being used
- Identify metrics planning and reporting requirements
  - Identify requirements mandated by the government (NPGs etc.) as appropriate to different classes of participants and dollar levels
  - Identify documentation requirements for different classes of participants (Grants, Cooperative Agreements, Working Agreements, Contracts, IRDs, ICDs, Operations Agreements, etc.)
  - Identify requirements/funding flow possibilities for the different classes of participants
- Recommend mechanisms to ESE to ensure successful performance monitoring

Schedule

Task Start – December 2001

Draft questions to send to sponsors and implementing organizations - January 4, 2002

Community Workshop - February 5-7, 2002

Refine questions and "visit list" - February 15, 2002

Obtain responses and conduct follow-up interviews – February – May 2002

Preliminary report – June 30, 2002

Further contacts with sponsors and implementing organizations as needed - July - October 2002

Recommendations to ESE about metrics planning and reporting mechanisms - December 2002

Questions / Topics for Breakout Sessions

1. What different provider types should be considered by this study?
2. What administrative instrument(s) (e.g., contract, grant, cooperative agreement, etc.) is/are used to administer your funding?
3. Do you find the administrative instrument(s) suitable for your activity's Mission? Please explain your response.
4. What are the technical (including metrics) and financial reporting requirements you meet?
5. Do you find that the reporting (including metrics) or other accountability mechanisms employed by your activity and its sponsor(s) are useful for reporting your successful accomplishments, and detecting and facilitating the mitigation of problems?
6. How do you believe your success is measured by your sponsor(s) and your user community?
7. How do you envision accountability for an activity in the SEEDS era?

SAMPLE QUESTIONS FOR ACTIVITIES AND SPONSORS

- Please describe your mission and major goals.
- Briefly describe your user community.
- Please provide an organization chart.
- What organization(s) funds your activities?
- What instruments (contract, grant, cooperative agreement, etc) is/are used to administer your funding?
- Please explain your technical (including metrics) and financial reporting requirements.
- Do you find the administrative instrument(s) suitable for your activity's mission? Pros and Cons?
- Are reporting requirements or other accountability mechanisms useful for detecting and facilitating the mitigation of problems?
- How do you believe your success is measured by your sponsor(s) and your user community?
- Does your activity include distributed elements that you fund and administer?

Sample Activities to be Contacted

- **Distributed Active Archive Centers**
  - GSFC, Langley, EROS Data Center, National Snow Ice Data Center, JPL
- **Earth Science Information Partners (ESIPs)**
  - Global Hydrology Research Center
  - Ocean ESIP
  - Global Land Cover Facility
  - Passive Microwave ESIP
  - So California Wildfire Hazard Center
- **Science Investigator-led Processing System (SIPS)**
  - MODAPS - MODIS Adaptive Processing System
  - TSDIS - TRMM Science Data and Information System
  - LaTIS - Langley TRMM Information System
- **Missions**
  - MISR
  - SeaWiFS
  - Grace (ESSP Mission)
  - QuikScat
- **Space Science**
  - STScI
  - Planetary Data System, JPL
  - National Space Science Data Center, GSFC